Cognos® 8 Business Intelligence

Reporting

QUICK START INSTALLATION AND CONFIGURATION GUIDE

COGNOS®

THE NEXT LEVEL OF PERFORMANCE™

Product Information

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Introduction

This document is intended for use with Cognos 8. Cognos 8 is a Web-based business intelligence solution with integrated reporting, analysis, scorecarding, and event management features.

This document provides the information you need to install and configure Cognos 8 on a single-server with default settings. These installations are suitable when you are setting up a test or evaluation environment, or for small production environments. This installation is the quickest and easiest way to get started.

Audience

To use this guide, you should be familiar with:

- reporting concepts
- scorecarding concepts
- database and data warehouse concepts
- security issues
- basic Windows and/or UNIX administration skills
- the existing server environment and security infrastructure in your organization

Related Documentation

Our documentation includes user guides, getting started guides, new features guides, readmes, and other materials to meet the needs of our varied audience. The following documents contain related information and may be referred to in this document.

Note: For online users of this document, a Web page such as **The page cannot be found** may appear when clicking individual links in the following table. Documents are made available for your particular installation and translation configuration. If a link is unavailable, you can access the document on the Cognos Global Customer Services Web site (http://support.cognos.com). Logon credentials are available either from your administrator or by request from support.america@cognos.com.

Document	Description
Cognos 8 Installation and Configuration Guide	Installing, upgrading, configuring, and testing Cognos 8, changing application servers, and setting up samples

Document	Description
Cognos 8 Administration and Security Guide	Managing servers, security, reports, and portal services; setting up Cognos samples; troubleshooting; and customizing Cognos 8
Cognos Configuration User Guide	Using Cognos Configuration to configure Cognos 8

Finding Information

To find the most current product documentation, including all localized documentation, access the Cognos Global Customer Services Web site (http://support.cognos.com). Click the **Documentation** link to access documentation guides. Click the **Knowledge Base** link to access all documentation, technical papers, and multimedia materials.

Product documentation is available in online help from the **Help** menu or button in Cognos products. You can also download documentation in PDF format from the Cognos Global Customer Services Web site.

You can also read PDF versions of the product readme files and installation guides directly from Cognos product CDs.

Using Quick Tours

Quick tours are short online tutorials that illustrate key features in Cognos product components. To view a quick tour, start Cognos Connection and click the **Quick Tour** link in the lower-right corner of the Welcome page.

Getting Help

For more information about using this product or for technical assistance, visit the Cognos Global Customer Services Web site (http://support.cognos.com). This site provides product information, services, user forums, and a knowledge base of documentation and multimedia materials. To create a case, contact a support person, or to provide feedback, click the **Contact Us** link. For information about education and training, click the **Training** link.

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Chapter 1: Cognos 8 Reporting

This guide describes how to install and configure Cognos 8 Reporting on a single computer with default settings. Cognos 8 Reporting is a Web product for reporting on your business data.

Cognos 8 Reporting includes Cognos 8 server and modeling components. Only the Cognos 8 components provided with Cognos 8 Reporting and installed by default are described in this guide. For information about installing and configuring components that are not installed by default, see the Cognos 8 *Installation and Configuration Guide*.

Server Components

Server components provide the user interfaces for reporting, as well as the server functionality for routing and processing user requests. Server components include the following tools:

Cognos Connection

Cognos Connection is a Web portal provided with Cognos 8, providing a single access point to the corporate data available for its products. It provides a single point of entry for querying, analyzing, and organizing data, and for creating reports, scorecards, and events. Users can run all their Web-based Cognos 8 applications through Cognos Connection. Other business intelligence applications, and URLs to other applications, can be integrated with Cognos Connection.

Report Studio

Report Studio lets report authors create, edit, and distribute a wide range of professional reports. They can also define corporate-standard report templates for use in Query Studio, and edit and modify reports created in Query Studio or Analysis Studio.

Query Studio

Query Studio lets users with little or no training quickly design, create and save reports to meet reporting needs not covered by the standard, professional reports created in Report Studio.

Cognos 8 Go! Office

Cognos 8 Go! Office allows Microsoft Office users to access data from Cognos reporting products within Microsoft Office applications.

Cognos 8 Go! Office components are automatically installed with Cognos 8.

For information about configuring Cognos 8 Go! Office, see the *Installation and Configuration Guide*.

Cognos Configuration

Cognos Configuration is a tool that you use to configure Cognos 8, and to start and stop its services.

Gateway

Web communication in Cognos 8 is typically through gateways, which reside on one or more Web servers. A gateway is an extension of a Web server program that transfers information from the Web server to another server.

Gateways are often CGI programs, but may follow other standards, such as Internet Server Application Program Interface (ISAPI) and Apache Modules (apache_mod).

Content Manager

Content Manager is the Cognos 8 service that manages the storage of customer application data, including security, configuration data, models, metrics, report specifications, and report output. Content Manager is needed to publish models, retrieve or store report specifications, manage scheduling information, and manage the Cognos namespace.

Content Manager stores information in a content store database.

Cognos Content Database

Cognos Content Database is an instance of an Apache Derby database. It is a selectable component, and is not installed by default. If you install it on the same computer as Content Manager, Cognos Content Database is configured as the default content store for Cognos 8.

Cognos Content Database can be used if you do not want to implement a third-party database for the content store.

Apache Derby is open source software whose license terms can be found on the Apache Derby web site (http://db.apache.org/derby/license.html). Modifying the Apache Derby database or using it with other products is not supported by Cognos. Any modifications that you make to the Apache Derby database are at your own risk.

You can use Cognos Content Database as a content store or notification database, but not as a query database.

Composite Information Server

Composite Information Server provides access to additional data sources such as LDAP, JDBC, Open XML and WSDL, and improves performance when querying data from different data sources.

Cognos 8 Samples

The Cognos 8 samples illustrate product features and technical and business best practices using data from a fictitious company, Great Outdoors. You can also use them for experimenting with and sharing report design techniques, and for troubleshooting.

Modeling Components

Modeling components model data within data sources to structure and present data in a way that is meaningful to users. Modeling components include the following tools:

Framework Manager

Framework Manager is the Cognos 8 modeling tool for creating and managing business-related metadata for use in Cognos 8 analysis and reporting. Metadata is published for use by reporting tools as a package, providing a single, integrated business view of any number of heterogeneous data sources.

Map Manager

Administrators and modelers use a Windows utility named Map Manager to import maps and update labels for maps in Report Studio. For map features such as country and city names, administrators and modelers can define alternative names to provide multilingual versions of text that appears on the map.

For information about using Map Manager, see the Map Manager *Installation and User Guide*.

Third-Party Components

In addition to the tools provided with Cognos 8 Reporting, it requires the following additional components that are created using third-party resources.

Content Store

The content store is a relational database that contains data that Cognos 8 needs to operate, such as report specifications, published models, and the packages that contain them; connection information for data sources; information about the external namespace, and the Cognos namespace itself; and information about scheduling and bursting reports. The relational database can be Cognos Content Database or a database from a supported third-party vendor.

Design models and log files are not stored in the content store.

The Cognos 8 service that uses the content store is named Content Manager.

Data Sources

Data sources, also known as query databases, are relational databases, dimensional cubes, files, or other physical data stores that can be accessed through Cognos 8. Application Tier Components use data source connections to access data sources.

Chapter 2: Installing and Configuring Cognos 8 Reporting on One Computer

This chapter provides the information you need to install and configure Cognos 8 Reporting on a single server with default settings. These installations are suitable when you are setting up a test or evaluation environment, or for small production environments. This installation is the quickest and easiest way to get started.

To follow these instructions, your Web server must be installed on the computer where you install Cognos 8 Reporting.

For information about how to upgrade or install and configure Cognos 8 Reporting on more than one computer or in a distributed installation, see the Cognos 8 *Installation and Configuration Guide* on the CD.

To install and configure Cognos 8 Reporting, you

- check the system and database connectivity requirements
- install the server components
- set up the environment
- configure the server components
- start the Cognos 8 services
- test the server components
- install Framework Manager
- test Framework Manager

You may also want to set up a samples database that contains sales and marketing information for a fictional company named the Great Outdoors. You can use Cognos sample packages and reports to help you learn how to use Cognos 8 Reporting.

Verify the System and Database Connectivity Requirements

Before you install Cognos 8, ensure that your computer meets the software and hardware requirements. The hardware requirements depend on your Cognos environment. You may require additional resources, such as disk space.

Verify System Requirements

Use the following table to check the minimum hardware and software requirements to install and run Cognos 8 components on one computer.

Requirement	Specification
Operating system	Windows UNIX: • Sun Solaris • HP-UX • IBM AIX Linux: • Red Hat Enterprise Linux on Intel-compatible x86 • SUSE Linux Enterprise Server Some Cognos 8 components are not supported under Linux.
RAM	Minimum: 2 GB
Disk space	Minimum: 2.5 GB of free space to install the software and 1 GB of free space on the drive that contains the temporary directory used by Cognos components.
Web server	A Web server installed and started
JRE	Java Runtime Environment (JRE) JRE is installed automatically with Cognos 8 on Windows.
Database	One of the following databases available to store Cognos data. • Oracle • DB2 • Microsoft SQL Server TCP/IP connectivity to Microsoft SQL Server • Sybase

Requirement	Specification
Web browser	For all Web browsers, the following enabled: • cookies • JavaScript For Microsoft Internet Explorer only, the following enabled: • Run ActiveX controls and plug-ins • Script ActiveX controls marked safe for scripting • Active scripting • Allow META REFRESH
Other	On Windows, Microsoft Data Access Component (MDAC) for use with product samples If you want to email reports, the ability to use a mail server

Set Up Database Connectivity for the Reporting Database

For Cognos 8, the only service that accesses the query database (also known as reporting database) is the reporting engine that runs reports.

To set up database connectivity for the reporting database:

- Ensure that you install the database API software for your reporting sources on each Cognos 8 server computer.

  On Windows, the report server supports either native database connectivity or ODBC. On UNIX and Linux, the report server supports the native database connectivity.

  On UNIX, for Microsoft SQL Server only, the report server supports the Data Direct ODBC driver. This driver is available from Data Direct.

  Cognos 8 requires TCP/IP connectivity with the Microsoft SQL Server.

Set Up Database Connectivity for the Content Store Database

If you are using a database other than Cognos Content Database as the content store, database client software must be installed and configured on each computer where you install Content Manager.

To set up database connectivity for the content store database:

- Install the appropriate JDBC driver for your Content Manager database, as follows:

Database	JDBC Driver
Oracle	JDBC thin driver, ojdbc14.jar If the directory contains the classes12.jar file, you must delete it before installing the ojdbc14.jar file.
DB2	JDBC driver that requires DB2 client installation
Microsoft SQL Server	Included with Cognos components. No other software is required. Cognos 8 requires TCP/IP connectivity with Microsoft SQL Server.
Sybase	JDBC driver, jconn2.jar
Cognos Content Database	Included with Cognos components. No other software is required.

Review Supported Environments

To ensure your product works properly, apply all required operating system patches and use only the versions of third-party software that are supported for a Cognos product.

To review an up-to-date list of environments supported by Cognos products, such as operating systems, patches, browsers, Web servers, directory servers, database servers, and application servers:

- Visit the Cognos Global Customer Services Web site (http://support.cognos.com).

  It is important to note that the Linux operating system is available in a number of distributions and supports a number of hardware platforms. Ensure that the operating system and hardware combination you are using is a supported combination.

  When you install Cognos 8 on Linux, Framework Manager is not installed. The BMTScriptPlayer is a command-line utility that interfaces with the Framework Manager engine, allowing you to run Framework Manager action logs. Because Framework Manager is not installed, the BMTScriptPlayer will not work.

Install the Server Components

To install Cognos 8 components, use the installation wizard to copy all the components to your computer.

The installation wizard for your Cognos 8 product is provided on the installation CDs. Run the installation wizard from the product CD to install that product.

Steps

1. Set the JAVA_HOME environment variable to point to the installation location of your Java Runtime Environment (JRE).
2. Insert the CD that is appropriate for your operating system. On UNIX, you must mount the CD using Rock Ridge file extensions.
3. Do one of the following if the **Welcome** page does not appear:
   - On Windows, in the win32 directory on the CD, double-click the issetup.exe file.
   - On UNIX, in the directory that is appropriate for your operating system, type

     ./issetup
   - On Linux, type

     ./issetup
4. Select the language to use for the installation.

   The language that you select determines the language of the user interface. You can change the language of the user interface to any of the installed languages after installation.
5. Follow the directions in the installation wizard.

   For a complete installation of the server components, you need all the components that are installed by default. To install only some components, or for a distributed installation, see the *Installation and Configuration Guide* on the CD.
6. In the **Finish** page of the installation wizard, choose how to proceed:
   - If you plan to install the Cognos 8 samples, do not select any options and then click **Finish**.
   - If you do not plan to install the Cognos 8 samples, click **Start Cognos Configuration** and then click **Finish**.
7. On UNIX, append the *c8_location*/bin directory to the appropriate library path environment variable:
   - For AIX, LIBPATH
   - For HP-UX, SHLIB_PATH
   - For Solaris, LD_LIBRARY_PATH
   - For Linux, LD_LIBRARY_PATH

If you want to use the samples that are available for Cognos 8, install the Cognos 8 samples.

Install the Cognos 8 Samples

The Cognos 8 samples illustrate product features and technical and business best practices. You can also use them for experimenting with and sharing report design techniques, and for troubleshooting. To use the samples, install them from the Cognos 8 Business Intelligence Samples 8.3 CD.

Steps

1. Insert the CD. On UNIX, you must mount the CD using Rock Ridge file extensions.
2. Go to the directory on the CD that is appropriate for your operating system.
3. Start the installation wizard:
   - On Windows, double-click the issetup.exe file.
   - On UNIX, type

     ./issetup
   - On Linux, type

     ./issetup

   The **Welcome** page of the installation wizard should appear.
4. Select the language to use for the installation.

   The language that you select determines the language of the user interface. You can change the language of the user interface to any of the installed languages after installation.
5. Follow the directions in the installation wizard.

   Install the samples in the same location as the server components.
6. In the **Finish** page of the installation wizard, click **Finish**.
7. Start Cognos Configuration.

   On Windows, use the **Start** menu to start **Cognos Configuration** from the shortcut folder.

To set up and configure the Cognos 8 samples, see "Setting Up the Samples" (p. 42).

Setting Up the Environment

To set up your environment, you must do the following:

- ❑ Create the content store
- ❑ Set up the database client
- ❑ Update the Java environment (on UNIX or Linux)
- ❑ Configure the Web server
- ❑ Configure Web browsers

Create the Content Store

The content store is a database that Content Manager uses to store global configuration data, global settings (such as the language and currency formats shown in the user interface), connections to data sources, and product-specific content. Design models and log files are not stored in the content store.

By default, Cognos 8 products share the content store database. You must create this database using one of the following:

- Microsoft SQL Server
- Oracle
- DB2
- Sybase Adaptive Server Enterprise (ASE)

On Linux, you can use Oracle, DB2, or Cognos Content Database for the content store.

A Microsoft SQL Server or Oracle database can use UTF-8 or UTF-16 encoding. A DB2 or Sybase database must use UTF-8 encoding. All database types must use the TCP/IP protocol, which is required by Cognos 8 to access data.

Note that Cognos 8 uses a single sort order that specifies the rules used by the database to interpret, collect, compare, and present character data. For example, a sort order defines whether the letter A is less than, equal to, or greater than the letter B; whether the collation is case sensitive; and whether the collation is accent sensitive. For more information about collation and collation sequences, see the database vendor documentation.

Your database administrator must back up Cognos 8 databases regularly because they contain the Cognos data. To ensure the security and integrity of databases, protect them from unauthorized or inappropriate access.

If you installed and are using Cognos Content Database as your content store, a database is already created and configured. However, you can create another database instance using Cognos Content Database.

Steps for Microsoft SQL Server

1. Ensure that your installation of Microsoft SQL Server is configured as follows:
   - UTF-8 or UTF-16 encoding is used

     For more information about character sets, encoding, and collation, see the Microsoft SQL documentation.
   - the collation sequence is case-insensitive

     In a Custom installation, you choose a collation, which includes character sets and sort order, during the SQL Server setup. In a Typical installation, the installation uses the locale identified by the installation program for the collation. This setting cannot be changed later.
   - the TCP/IP protocol is enabled

This protocol is required by Cognos 8 to access data.

2. Open Microsoft SQL Server Management Studio and connect to the database server using SQL server authentication.

   If you connect using Windows authentication, the database that you create will also use Windows authentication. Cognos 8 is configured by default to use a database with SQL server authentication.

3. Create the database.

   If you connected to the database server using Windows authentication, you must configure the database connection using a database type of **SQL Server database (Windows Authentication)** in Cognos Configuration.

   For more information, see "Set Database Connection Properties for the Content Store" (p. 28).

4. Create the user account that will be used to access the database:
   - Under **Security**, right click **Logins** and select **New Login**.
   - Specify a Login name.
   - Select **SQL Server authentication** and specify the **Password**.
   - Clear **Enforce password policy**.

     This clears all three check boxes.
   - Click **OK**.

   Tip: If you want to host more than one content store on your Microsoft SQL Server instance and you will use both at the same time, use a different user account for each content store to ensure that each Cognos 8 instance is fully isolated from the others.

5. Create a schema:
   - Under **Databases**, expand the database (***new_database***) that you created in step 3.
   - Under ***new_database***, expand **Security**.
   - Right-click **Schemas** and select **New Schema**.
   - Specify the **Schema name** and click **OK**.

6. Configure the database user:
   - Under **Databases**, ***new_database***, **Security**, right click **Users** and select **New User**.
   - Specify the **User name**.
   - For **Login name**, browse and select the login that you created in step 4.
   - For **Default schema**, browse and select the schema that you created in step 5.
   - In the **Owned Schemas** list, select the same schema as **Default schema**.
   - In the **Role Members** list, select **db_datareader**, **db_datawriter**, and **db_ddladmin**.

- Click **OK**.

7. Repeat steps 4 to 6 for each new user account.

Steps for Oracle

1. Ensure that the parameter for the database instance compatibility level of the content store database is set to 9.0.1 or higher.

   For information about changing an instance configuration parameter, see the Oracle documentation.

2. Determine if the database is Unicode.

   Tip: One method is to type the following select statement:

   select * from NLS_DATABASE_PARAMETERS

   The result set returns NLS_CHARACTERSET as UTF-8 or UTF-16, or AL32UTF8 or AL16UTF16, or not Unicode.

   If the result set returns an NLS_CHARACTERSET that is not Unicode, create a new database and specify AL32UTF8 or UTF-8 for the database character set parameters.

3. Determine which user account will be used to access the database.

   Tip: If you want to host more than one content store on your Oracle instance and you will use both at the same time, use a different user account for each content store to ensure that each Cognos 8 instance is fully isolated from the others.

4. Ensure that the user account that accesses the database has permission to do the following:
   - connect to the database
   - create, alter, and drop tables, triggers, views, procedures, and sequences
   - insert, update, and delete data in the database tables

Steps for DB2

1. Set the appropriate environment variables for DB2.

Environment variable	Description
DB2DIR	The top level directory that contains the database client software or the entire database installation.
*library*PATH	The load library path.You must add driver location. Examples:

Environment variable	Description
On Solaris: LD_LIBRARY_PATH	Solaris example: LD_LIBRARY_PATH= $DB2DIR/lib: $LD_LIBRARY_PATH
On AIX: LIBPATH	AIX example: LIBPATH=$DB2DIR/lib: $LIBPATH
On HP-UX: SHLIB_PATH	HP-UX example: SHLIB_PATH=$DB2DIR/lib: $SHLIB_PATH
DB2INSTANCE	The default database server connection.
DB2CODEPAGE	Setting this optional environment variable to a value of 1208 provides support for multilingual databases. For information about whether to use this environment variable, see the DB2 documentation.

2. Determine if the database is Unicode by typing the following at the command prompt:

   db2 get database configuration for database_name

   The codepage is Unicode if it has a value of 1208.

3. If the codepage is not Unicode, create a new database that has a codepage value of 1208.

4. Ensure that you set the following configuration parameters.

Property	Setting
Application heap size (applheapsz)	1024k
Lock timeout	4 min. (or 240 sec.) Do not set this to an infinite timeout value.

5. Create a buffer pool with a page size of 32k.

6. Create a system temporary tablespace with a page size of 32k.
7. Create a user temporary tablespace with a page size of 4k.

   Global temporary tables will be created in the user temporary tablespace.
8. Create a regular user tablespace with a page size of 4k.
9. If you already created the content store and are now creating a logging database, create an additional regular user tablespace with a page size of 8k.
10. Determine which user account Cognos 8 will use to access the database.

    Tip: If you want to host more than one content store on your DB2 instance and you will use both at the same time, use a different user account for each content store to ensure that each Cognos 8 instance is fully isolated from the others.
11. Grant create and drop table privileges on the database to the user account.

    Ensure that the user account has CREATETAB, CONNECT and IMPLICITSCHEMA privileges for the database.

    Ensure that the user account has USE privileges for the USER TEMPORARY tablespace and other appropriate tablespaces associated with the database.

    For Windows XP, ensure that the user account has GRANT privileges for the USER TEMPORARY tablespace.

Steps for Sybase Adaptive Server Enterprise

1. On the Sybase server, create a server instance with an 8K server page size.

   For instructions, see the Sybase documentation.
2. If required, install jConnect 5.5.

   This tool sets up the communication between the JDBC driver and the Sybase Adaptive Server instance.

   For instructions, see the Sybase documentation.

   If your version of Sybase does not include JConnect 5.5, you must download the installer from Sybase's Web site.
3. Add the UTF-8 character set to the server instance.
4. If required, make UTF-8 the default character set on the server.
5. Create a database device.

   Tip: Set **log_segment** to a minimum of 10 MB.
6. Set the new database device as the default.

   Information about the new database will be stored in the new database device. Keep a backup of the database device for recovery purposes.
7. Create the database.

8. Determine which user account will be used to access the database.

   Tip: If you want to host more than one content store on your Sybase instance and you will use them at the same time, use a different user account for each content store to ensure that each Cognos 8 instance is fully isolated from the others.

9. Grant create and drop table privileges on the database to the user account.

   Ensure that the user account has the following privileges for the database: create default, create procedure, create rule, create table, and create view.

10. For the database, set the **Select into** property to True and restart the server.

Steps for Cognos Content Database

1. On the computer where you installed Cognos Content Database, go to the *c8_location*\derby10.1.2.1\bin directory.

   You need only to perform this task if you want to create another content store database in Cognos Content Database. During Cognos Content Database installation, a database was created and Cognos 8 is already configured to use that database.

2. Start the ij utility using the ij.bat or ij.ksh script.

   The ij utility is a command line utility for creating and managing Cognos Content Database.

3. Create a database by typing the following ij utility command:

   connect 'jdbc:derby://*host*:*port*/*db_name*;create=true;user=*username*; password=*password*';

   For example, to create a database named contentstore on the localhost computer on port number 1527 as a user named cognos with a password of cognos, you would type

   connect 'jdbc:derby://localhost:1527/contenstore;create=true;user=cognos;password=cognos';

   The database name is case sensitive.

   The database files are located in the *c8_location*\contentstore directory.

4. Close the ij utility by typing the following command:

   disconnect;

Set Up the Database Client

If you use Oracle, DB2, or Sybase as the database server for the content store, additional steps are required after you install Cognos 8 before you can configure it. You must set up the database client on every computer where Content Manager, Framework Manager, or Cognos 8 Transformer is installed. The database client supports the use of Cognos 8 packages and reports, as data sources, in Framework Manager and Cognos 8 Transformer. To set up the database client, perform the following steps.

Database	Additional Steps
Oracle	Set up the JDBC driver.
DB2	Set up the database client software and the JDBC 2.0 driver. On UNIX, ensure that the 32-bit DB2 libraries are in the library search path, which is usually the $DB2DIR/lib directory or the $DB2DIR/lib32 directory.
Sybase	Set up the JDBC driver.
Microsoft SQL Server	No additional steps are required. The JSQLConnect.jar is installed to the appropriate location by default.
Cognos Content Database	No additional steps are required.

Steps for Oracle

1. On the computer where the Oracle client is installed, go to the ORACLE_HOME/jdbc/lib directory.
2. Copy the ojdbc14.jar file to the *c8_location*/webapps/p2pd/WEB-INF/lib directory on computers where Content Manager is installed.

   If the directory contains the classes12.jar file, delete it before installing the ojdbc14.jar file.

   This file includes the driver required by the content store.

Steps for DB2

1. Install the DB2 client software on the appropriate computers.
2. If the content store is on a different computer from Content Manager, configure a database alias to the content store by running the DB2 Client Configuration Assistant.

   On UNIX or Linux, use the DB2 command line interface.

   If the content store database and Content Manager are on the same computer, the content store name automatically becomes the alias.

   When you configure the Content Manager computers, ensure that they are all configured to use the same content store.
3. On Windows, stop the DB2 services and the HTML Search Server.
4. To copy the JDBC2 driver, copy the *DB2_installation*/sqllib/java/db2java.zip file to the *c8_location*/webapps/p2pd/WEB-INF/lib directory.

5. Rename the db2java.zip file to db2java.jar.
6. On Windows, restart the DB2 services and the HTML Search Server.

You can tune the database to take advantage of DB2 features. For more information, see the *Architecture and Deployment Guide*.

Steps for Sybase

1. On the computer where Sybase is installed, go to the Sybase_location/jConnect-5_5/classes directory.
2. Copy the jconn2.jar file to the *c8_location*/webapps/p2pd/WEB-INF/lib directory on every computer where Content Manager is installed.

Update the Java Environment

Cognos 8 cryptographic services use a specific .jar (Java Archive) file, named bcprov-jdk*nn-nnn*.jar, that must be located in your Java Runtime Environment (JRE). This file provides additional encryption and decryption routines that are not supplied as part of a default JVM installation. To ensure security, the encryption file must be loaded by the JVM using the java extensions directory.

If you want to use your own JRE and have JAVA_HOME set to that location on Windows or if you are installing on UNIX, you may have to update the Java environment for the cryptographic services.

On Windows, you can set JAVA_HOME as a system variable or a user variable. If you set it as a system variable, it may be necessary to restart your computer for it to take effect. If you set it as a user variable, set it so that the environment in which Tomcat is running can access it.

If you do not have a JAVA_HOME variable already set on Windows or if JAVA_HOME points to a Java version that is not valid for Cognos 8, the JRE files provided with the installation will be used, and you do not have to update any files in your environment.

Steps

1. Ensure that the JAVA_HOME environment variable is set to the JRE location.

   For example, to set JAVA_HOME to the JRE files provided with the installation, the path is *c8_location*/bin/jre/*version*.
2. Copy the bcprov-jdk*nn-nnn*.jar file from the *c8_location*/bin/jre/*version*/lib/ext directory to the *Java_location*/jre/lib/ext directory.

Configure the Web Server

Before you use Web pages generated by Cognos 8, you must configure your Web server. You must set up virtual directories, also known as Web aliases, for the directories that contain the HTML and Web files for Cognos 8.

The virtual directories in the Alias column of the following table are required for all Web servers.

Alias	Location	Permission
cognos8	*c8_location*/webcontent	Read
cognos8/cgi-bin	*c8_location*/cgi-bin	Execute

Configure Web Browsers

Cognos 8 uses the default browser configurations provided by Microsoft, Netscape, and Firefox. For all browsers, you must ensure that settings are enabled for cookies and Java scripts. Additional required settings are specific to the browser.

The following table shows the settings that must be enabled in the supported Web browsers.

Browser	Setting	Cognos component
Internet Explorer (settings for studios and portals)	Allow Cookies Active Scripting Allow META REFRESH	Cognos Connection Cognos Administration Report Studio Query Studio
Internet Explorer (settings for some studios)	Run ActiveX controls and plug-ins Script ActiveX controls marked safe for scripting	Report Studio Query Studio
Internet Explorer (settings for a single studio)	Binary and Script Behaviours Allow programmatic clipboard access	Report Studio
Netscape	Allow Cookies JavaScript	Cognos Connection Cognos Administration Query Studio
Firefox	Allow Cookies Enable Java Enable JavaScript Load Images	Cognos Connection Cognos Administration Query Studio

Note: Report Studio and Query Studio use the native Microsoft Internet Explorer XML support, which is a component of the browser. ActiveX support must be enabled because Microsoft implements XML using ActiveX. Cognos 8 does not provide or download ActiveX controls. Only the ActiveX controls that are installed as part of Internet Explorer are enabled through this configuration.

Important: If Adblock Plus is installed with Firefox, disable it using the per-page option. Adblock Plus prevents some Cognos Connection resources from working properly.

Cognos 8 uses the following cookies to store user information.

Cookie	Type	Purpose
AS_TICKET	Session temporary	Created if Cognos 8 is configured to use a Cognos Series 7 namespace
caf	Session temporary	Contains security state information
Cam_passport	Session temporary	Stores a reference to a user session stored on the Content Manager server
cc_session	Session temporary	Holds session information that is specific to Cognos Connection
cc_state	Session temporary	Holds information during edit operations, such as cut, copy, and paste
CRN	Session temporary	Contains the content and product locale information, and is set for all Cognos users
CRN_RS	Persistent	Stores the choice that the user makes for "view members folder" in Report Studio

Cookie	Type	Purpose
PAT_CURRENT_FOLDER	Persistent	Stores the current folder path if local file access is used, and is updated after the Open or Save dialog box is used
qs	Persistent	Stores the settings that the user makes for user interface elements such as menus and toolbars
usersessionid	Session temporary	Contains a unique user session identifier, valid for the duration of the browser session.

After upgrading or installing new software, restart the Web browser and advise users to clear their browser cache.

Configuring the Server Components

After you install the Cognos 8 server components, some of the following configuration tasks are required:

- ❑ Configure a user account for Cognos 8
- ❑ Set the database connection properties for the content store
- ❑ Configure a mail server account and notification database
- ❑ Update file location properties, if installing on Windows Vista

Configure a User Account for Cognos 8

The account under which Cognos 8 runs must:

- have access to all required resources, such as printers and Web servers
- have the rights to logon as a service and act as part of the operating system
- be a member of the local admin group

For example, to print reports using a network printer, the account must have access to the network printer, or you must assign a logon account to the Cognos 8 service.

For Windows, we recommend that you assign a logon account to the Cognos 8 service. You can configure the Cognos 8 service to use a special user account by selecting the Cognos 8 service from the list of services shown in the Services window in Windows. You can then define the user account properties.

For UNIX or Linux, we recommend that you create a new UNIX or Linux group named cognos8. This group must contain the user that owns the Cognos files. Change the group ownership of the Cognos files to the cognos8 group and change the file permissions for all Cognos files to GROUP READABLE/WRITABLE/EXECUTABLE.

Set Database Connection Properties for the Content Store

For all installations not using Cognos Content Database, you must specify the database server information to ensure that Content Manager can connect to the database you use for the content store. Content Manager uses the database logon to access the content store. After you set the database connection properties, you can test the connection between Content Manager and the content store.

If you have installed Cognos Content Database, the database connection properties will use the default Cognos Content Database. You do not have to change the default connection properties. If you install Cognos Content Database on the same computer as Content Manager, and you later decide to use another database for your content store, you must uninstall Cognos Content Database.

Steps for Microsoft SQL Server, Oracle, DB2, and Sybase

1. Start Cognos Configuration.
2. In the **Explorer** window, under **Data Access**, **Content Manager**, right-click **Content Store** and click **Delete**.

   This deletes the default resource. Content Manager must be configured to access only one content store.
3. Right-click **Content Manager**, and then click **New resource**, **Database**.
4. In the **Name** box, type a name for the resource.
5. In the **Type** box, select the type of database and click **OK**.

   Tip: If you want to use Oracle Net8 keyword-value pair to manage the database connection, select **Oracle database (Advanced)**.
6. In the **Properties** window, provide values depending on your database type:
   - If you use a Microsoft SQL Server database, type the appropriate values for the **Database server with port number or instance name** and **Database name** properties.

     For a Microsoft SQL Server database, you can choose to use a port number, such as 1433, or a named instance as the value for the **Database server with port number or instance name** property.

To connect to a named instance, you must specify the instance name as a JDBC URL property or a data source property. For example, you can type **localhost\instance1**. If no instance name property is specified, a connection to the default instance is created.

Note that the properties specified for the named instance, along with the user ID and password, and database name, are used to create a JDBC URL. Here is an example:

jdbc:JSQLConnect://localhost\\instance1/user=sa/*more properties as required*

- If you use a DB2 database, for the **Database name** property, type the database alias.
- If you use an Oracle database, type the appropriate values for the **Database server and port number** and **Service name** properties.
- If you use an advanced Oracle database, for the **Database specifier** property, type the Oracle Net8 keyword-value pair for the connection.

  Here is an example:

  (description=(address=(host=myhost)(protocol=tcp)(port=1521)(connect_data=(sid=(orcl)))))
- If you use a Sybase database, type the appropriate values for the **Database server and port number** and **Database name** properties.

7. If you want to change the logon credentials, specify a user ID and password:
   - Click the **Value** box next to the **User ID and password** property and then click the edit button when it appears.
   - Type the appropriate values and click **OK**.
8. From the **File** menu, click **Save**.

   The logon credentials are immediately encrypted.

Content Manager can now create the required tables in the content store when you start the Cognos 8 service for the first time. If the connection properties are not specified correctly, you cannot connect to Cognos Connection.

Specify a Mail Server Account and Notification Database

If you want to send reports by email, you must configure a mail server account. You must also specify the location of the database that is used by the notification server to store job and schedule information.

When you finish configuring a mail server account and notification database, you can test the connections to the mail server and notification database.

Steps

1. Start Cognos Configuration.
2. In the **Explorer** window, under **Data Access**, click **Notification**.

3. In the **Properties** window, for the **SMTP mail server** property, type the host name and port of your SMTP (outgoing) mail server.
4. Click the **Value** box next to the **Account and password** property and then click the edit button when it appears.
5. Type the appropriate values in the **Value - Account and password** dialog box and then click **OK**.

   Tip: If logon credentials are not required for the SMTP server, remove the default information for the **Account and password** property. When you are prompted for confirmation to leave this property blank, click **Yes**. Ensure that the default user name has been removed. Otherwise, the default account is used and notifications will not work properly.
6. In the **Properties** window, type the appropriate value for the default sender account.
7. From the **File** menu, click **Save**.
8. Test the notification and mail server connections. In the **Explorer** window right-click **Notification** and click **Test**.

   Cognos 8 tests the database connection and tests the mail server connection.

   If you have been using the content store database for notification, the schedules will be replicated in the tables of the new notification database.

Update File Location Properties

If you install Cognos 8 on Windows Vista, you must change file locations properties in Cognos Configuration so that Cognos 8 can use a single data location for all users.

Windows Vista has a security enhancement that restricts multiple users from sharing data locations. You can define environment variables and use them in Cognos Configuration when specifying file locations. This allows you to direct applicable files to an area that will be accessible by Cognos 8 users. On Windows, two environment variables are preset for users: one for all users and one for the specific user

Because the environment variables represent system root locations, we recommend that you also include the root directory name of the installation location when you specify file locations in Cognos Configuration. The default root directory for Cognos 8 is c8.

Steps

1. Start Cognos Configuration.
2. In the **Explorer** window, click **Environment**.
3. In the **Properties** window, click **Deployment files location**.
4. Replace the relative path element, "..", with the appropriate environment variable and root directory, using the following suggested environment variables:
   - For a single file location per user, %LOCALAPPDATA%

- For a single file location for all users on the computer, %PUBLIC%

For example,

To set a single file location per user, specify the path %LOCALAPPDATA%/c8/deployment.

5. Repeat step 4 for the following properties:
   - Under **Environment**,
     - **Data files location**
     - **Map files location**
     - **Temporary files location**
   - Under **Environment**, **Logging**, **File**,
     - **Log file location**
   - Under **Cryptography**,
     - **Common symmetric key store location**
   - Under **Cryptography**, **Cognos**,
     - **Certificate location**
     - **Signing key store location**
     - **Encryption key store location**
6. From the **File** menu, click **Save**.

The environment variables are resolved when the file locations are accessed during system activities.

Start Cognos 8 Services

To register the Cognos 8 service so that users can access it through Cognos Connection, you must start the services. Before you start the services, test the configuration by using the test feature in Cognos Configuration.

Before you can use Framework Manager, you must start the Cognos 8 service. On Windows, the Cognos 8 service is configured to start automatically by default. On UNIX and Linux, to start the Cognos 8 process automatically, you must configure the process as a daemon. For more information, see your operating system documentation.

You must install and configure both the server components of Cognos 8 and Framework Manager before you can use Cognos 8 for reporting.

Note: Cognos 8 cannot access any reporting data unless the data is first packaged in and published from Framework Manager.

Steps

1. Start Cognos Configuration.

2. Ensure that you save your configuration, otherwise you cannot start the Cognos 8 service.
3. From the **Actions** menu, click **Test**.

   Cognos Configuration checks the CSK availability, tests the namespace configuration, and tests the connections to the content store and logging database.

   If you are using the notification database and the mail server, they are tested as well.

   Tip: If **Test** is not available for selection, in the **Explorer** window, click **Local Configuration**.
4. If the test fails, reconfigure the affected properties and then test again.

   Do not start the service until all tests pass.
5. From the **Actions** menu, click **Start**.

   It may take a few minutes for the Cognos 8 service to start.

   This action starts all installed services that are not running. If you want to start a particular service, select the service node in the **Explorer** window and then click **Start** from the **Actions** menu.

Test the Server Components

You can test your configuration settings by running the test feature before you start the Cognos 8 service. Then you can test the installation by starting the Cognos 8 service and then opening Cognos Connection. On Windows, the Cognos 8 service is configured to start automatically by default.

On UNIX and on Linux, to start the Cognos 8 process automatically, you must configure the process as a daemon. For more information, see your operating system documentation.

You must install and configure Framework Manager before you can use Cognos 8 for analysis.

Steps

1. Start Cognos Configuration.
2. Ensure that you save your configuration, otherwise you will not be able to start the Cognos 8 service.

   If you are upgrading, a message appears indicating that configuration files were detected and upgraded to the new version.
3. From the **Actions** menu, click **Test**.

   Cognos Configuration checks the CSK availability, tests the namespace configuration, and tests the connections to the content store, logging database, notification database, and the mail server.

   Tip: If **Test** is not available for selection, in the **Explorer** window, click **Local Configuration**.
4. If any test fails, reconfigure the affected properties and then test again.

   Do not start the service until all tests pass.

5. From the **Actions** menu, click **Start**.

   It may take a few minutes for the Cognos 8 service to start.

   This action starts all installed services that are not running. If you want to start a particular service, select the service node in the **Explorer** window and then click **Start** from the **Actions** menu.

6. Open a Web browser.

7. Type the following, where cognos8 is the virtual directory you created when you configured the Web server:

   http://host_name:port/cognos8

   It may take a few minutes for the Web page to open. If you see the **Welcome** page of Cognos Connection, your Cognos 8 installation is working.

Install Framework Manager

To install Framework Manager, use the installation wizard to copy all of the components to a Windows computer.

Steps

1. If Cognos 8 is also installed on the Windows computer, stop the Cognos 8 service.

2. Insert the CD for your Cognos modeling product, and then open the installation menu.

   The **Welcome** page of the installation wizard appears. If the **Welcome** page does not appear, in the win32 directory on the CD, double-click issetup.exe.

3. Select the language to use.

4. Follow the directions in the installation wizard.

   Install Framework Manager to the same directory as other Cognos 8 components.

To ensure the security and integrity of Cognos 8, it is also important to protect the installation directory from unauthorized or inappropriate access.

Test Framework Manager

Before you can use Framework Manager, you must start the Cognos 8 service.

Steps

1. Start the Cognos 8 service.

2. From the **Start** menu, click **Programs**, **Cognos 8**, **Framework Manager**.

   You may be prompted to upgrade if the model schema version is older than the currently supported version.

If you see the **Welcome** page of Framework Manager, your installation is working.

Uninstalling Cognos 8

It is important to use uninstall programs to completely remove all files and modifications to system files.

Uninstall Cognos 8 on UNIX or Linux

If you no longer require Cognos 8 or if you are upgrading, uninstall Cognos 8.

Steps

1. If the console attached to your computer does not support a Java-based graphical user interface, determine the process identification (pid) of the Cognos 8 process by typing the following command:

   ps -ef grep cogbootstrapservice

2. Stop the Cognos 8 process:
   - If you run XWindows, start Cognos Configuration, and from the **Actions** menu, click **Stop**.
   - If you do not run XWindows, type:

     kill -TERM pid

3. To uninstall Cognos 8, go to the *c8_location*/uninstall directory and type the appropriate command:
   - If you use XWindows, type

     ./uninst -u

   - If you do not use XWindows, type

     ./uninstcc -u

4. Follow the prompts to complete the uninstallation.
5. Delete all temporary Internet files.

Uninstalling does not remove any files that changed since the installation, such as configuration and user data files. Your installation location remains on your computer, and you retain these files until you delete them manually.

Important:

- Do not delete the configuration and data files if you are upgrading to a new version of Cognos 8 and you want to use the configuration data with the new version.
- If you are using Cognos Content Database, the default location for the database files is in the *c8_location*/contentstore directory. If you want to keep your database after uninstalling, do not delete this directory.

Uninstall Cognos 8 on Windows

If you no longer require Cognos 8 or if you are upgrading, uninstall all Cognos 8 components and the Cognos 8 service.

If you installed more than one component in the same location, the uninstall wizard lets you choose the packages to uninstall. All components of the package will be uninstalled. You must repeat the uninstallation process on each computer that contains Cognos 8 components.

It is not necessary to back up the configuration and data files on Windows. These files are preserved during the uninstallation.

We recommend that you close all programs before you uninstall Cognos 8. Otherwise, some files may not be removed.

Uninstalling does not remove any files that changed since the installation, such as configuration and user data files. Your installation location remains on your computer, and you retain these files until you delete them using Windows Explorer.

Important: Do not delete the configuration and data files if you are upgrading to a new version of Cognos 8 and you want to use the configuration data with the new version.

Steps

1. From the **Start** menu, click **Programs**, **Cognos 8**, **Uninstall Cognos 8**.

   The **Uninstall** wizard appears.

   Tip: Cognos 8 is the default name of the Program Folder that is created during the installation. If you chose another name, go to that folder to find the program.

2. Follow the instructions to uninstall the components.

   The cognos_uninst_log.htm file records the activities that the Uninstall wizard performs while uninstalling files.

   Tip: To find the log file, look in the Temp directory.

3. Delete all temporary Internet files.

   For more information, see your Web browser documentation.

Chapter 3: Samples

This section explains the purpose, content and location of Cognos 8 samples. It also discusses the sample company, Great Outdoors, its structure, databases, model and packages.

For information on how to set up the sample databases, see "Setting Up the Samples" (p. 42).

Great Outdoors Samples

The Great Outdoors samples illustrate product features and technical and business best practices. You can also use them for experimenting with and sharing report design techniques, and for troubleshooting.

For examples related to different kinds of businesses, see the product blueprints on the Cognos Web site (http://www.cognos.com). For information about specific installation choices and environments, see the *Architecture and Deployment Guide*, or the Proven Practices and the Cognos Implementation Roadmaps on the Cognos Global Customer Services Web site (http://support.cognos.com). For information about audit samples, see the *Administration and Security Guide*.

Where to Find the Samples

The samples are included with the product and the samples for each studio are described in the related user guide and online help. To use the samples, you must set up and configure them, or contact your administrator to find out where they are installed. For instructions on how to set up and configure samples, see the *Installation and Configuration Guide* or the *Administration and Security Guide*.

What Samples Exist

The samples consist of

- two databases that contain all corporate data, the related sample models for query and analysis, and sample cubes, reports, queries, query templates, and dashboards
- a metrics database and the associated metrics, including a strategy map for the consolidated company

  Note: You must have Metric Studio installed to use these samples.
- reports that contain extended tips to explain how and why they were created

  Note: These reports are stored in a folder labeled Practical Examples in the samples folder of the Cognos 8 installation.

Security

You can add security to the samples using an employee list included with the product. The list is in the form of an LDIF file that can be imported into any directory server, such as the Sun Java System Directory Server.

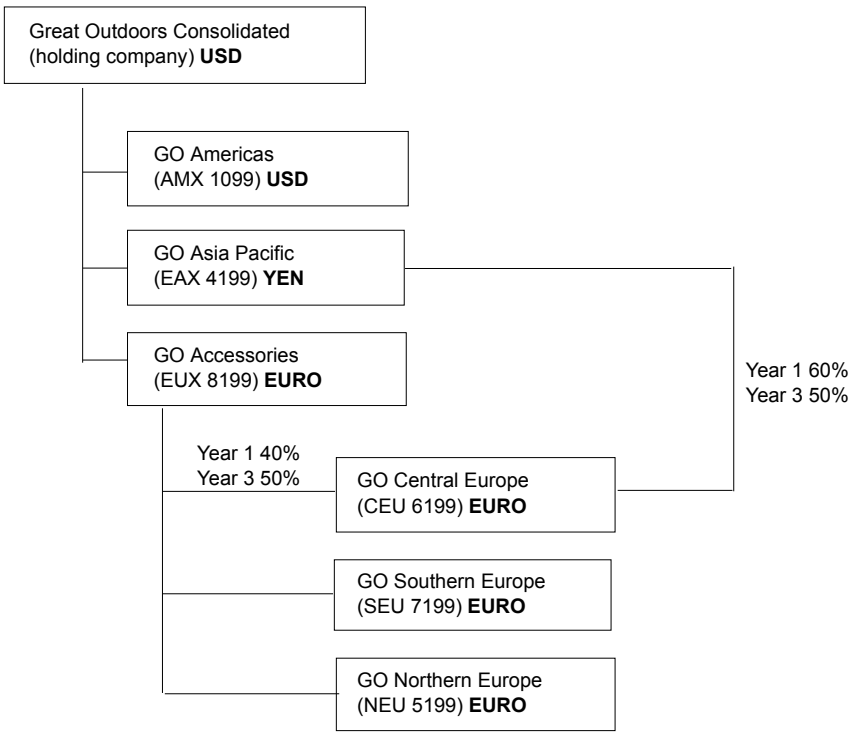
Note: You can download a version of the Sun Java System Directory Server from the Sun Web site (http://www.sun.com/download/). For more information, see the *Installation and Configuration Guide*. For information about conformance, see the Cognos Global Customer Services Web site (http://support.cognos.com).

The Great Outdoors Group of Companies

To make designing examples faster, especially financial examples, some general information about the fictional Great Outdoors company is useful. To look for samples that use particular product features, see the individual sample descriptions in this appendix.

Revenue for The Great Outdoors comes from corporate stores and from franchise operations. The revenues are consolidated from the wholly-owned subsidiaries. The corporate structure is shown below.

The diagram below illustrates the consolidated corporate structure, including the percentage changes in ownership for GO Central Europe, and shows the reporting currency and GL prefix for each subsidiary.



Each corporation has the same departmental structure and the same GL structure, shown in the table below. Divisions may not report in the same currencies. For example, the Americas subsidiary reports in US dollars, but the Corporate division local currency is Canadian dollars, and the Operations division local currency is pesos.

Division (GL)	Department (GL)
Corporate division (1700)	Sales (1720)
	Marketing (1750)
	IS&T (1760)
	Human Resources (1730)
	Finance (1740)
	Procurement (1710)
Operations (1800)	Production and Distribution (1820)
	Customer Service (1820)

Employees

The Great Outdoors data contains a full list of employees in all divisions, departments, and locations. Data is available for reports about bonuses (Global Bonus report) and sales commissions (Sales Commissions for Central Europe report), training (Employee Training by Year report), and performance reviews and employee satisfaction surveys (Employee Satisfaction 2006). If you use Metric Studio, sample metrics for human resources are also available.

In the GO Data Warehouse (analysis) package, groups of measures and the related dimensions are organized into folders. The employees are organized in hierarchies for region, manager, position or department, and organization, to make different kinds of aggregation easy to report on. Aggregation has been set for the Employee Position Summary measures, so that Position count and Planned position count aggregate to a maximum for time dimensions, and a sum for other dimensions. For example, see the Planned Headcount report.

The employees are also listed in a sample LDIF file (p. 38). This authentication directory is necessary for the Transformer 8 cubes and for Cognos Planning samples. No other samples depend on security profiles. For more information, see the *Installation and Configuration Guide*.

Sales and Marketing

Data about sales and marketing is available for all of the companies in the Great Outdoors group. GO Accessories has richer details to support analysis examples. For example, see the Revenue vs % Gross Profit by Product Brand analysis, based on the Sales and Marketing cube. Marketing and sales campaigns are tied to the Great Outdoors regional companies.

Overall, the GO companies have experienced solid growth across most product lines (Sales Growth Year Over Year), in all regions (Revenue by GO Subsidiary 2005), because of factors like an increase in repeat business and new or improved products, such as the high margin sunglasses product line. In the product lines sold by the five regional companies (all but GO Accessories) promotions have had mixed success (Promotion Success by Campaign, Bundle and Quarter). If you use Metric Studio, this can also be seen in the sample metrics.

Customer Surveys

The data also contains information from customer surveys. For example, the product line that includes bug spray, sun screen, and so on has not been successful (Product Satisfaction - Outdoor Protection 2005) and a source of retailer dissatisfaction may be the level of customer service rather than the returns (Customer Returns and Satisfaction). If you use Metric Studio, this information can also be monitored in metrics.

Sales Outlets

Revenue from the corporate outlets is available at the transaction level. Revenue from the franchise outlets is available at the consolidated level only (Sales and Marketing cube). Metrics about retailers show that the number of new retail outlets has dropped over the time period covered by this data.

GO Accessories sells worldwide, and sells only accessories. The other five subsidiaries in the group of companies are regional and sell all product lines for retailers in their region. For example, the report Top 10 Retailers in 2005 uses sparklines and list data to review revenues at the retailer level.

Great Outdoors Database, Models, and Packages

The Great Outdoors models illustrate modeling techniques and support the samples. The models are based on the GO data warehouse and the GO sales transactional database and are the basis for the sample reports and queries. Each model contains two packages for publishing analysis (dimensional) and query views of the data.

For a description of each sample report or query, see the user guide for the studio that you open the sample in. For more information about modeling techniques, see the *Guidelines for Modeling Metadata*, or the Framework Manager *User Guide*.

You must have access to Framework Manager, the modeling tool in Cognos 8, to look at the sample models. You may also need to set up the sample databases and connections. For instructions, see the *Administration and Security Guide* or the *Installation and Configuration Guide*.

GO Data Warehouse

The GO Data Warehouse model, great_outdoors_data_warehouse.cpf, is based on the database GOSALESDW. It contains data about human resources, sales and marketing, and finance, grouped into business areas. In the Database view, the three business areas are grouped into separate namespaces. The Database view contains a fourth namespace (GO Data) for the common information.

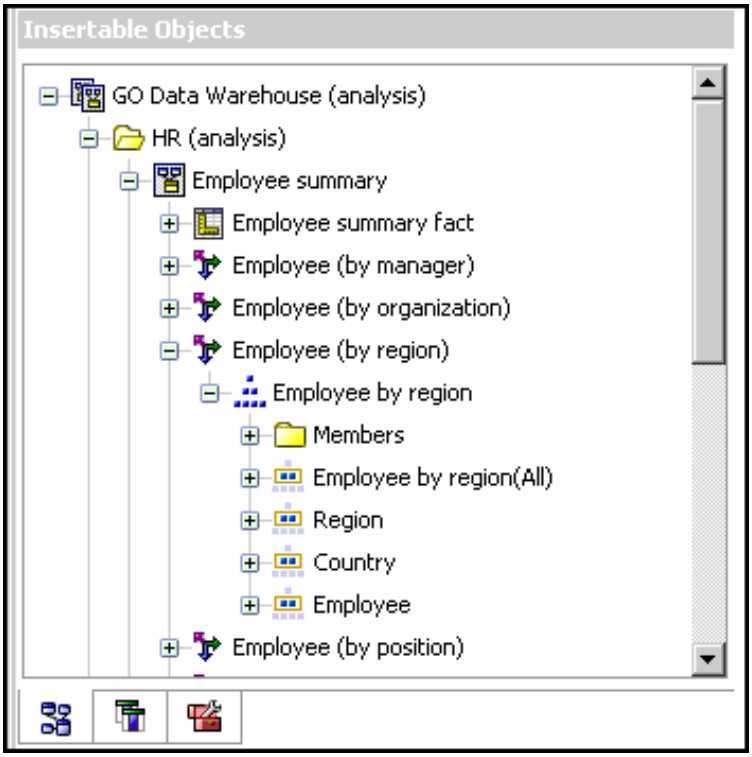
The Database view is very similar to the structure of the underlying database. All tables (database query subjects) are unchanged. This enables Cognos 8 to retrieve metadata directly from the package

in most cases, instead of using a metadata call to the database. The following changes and additions have been made in the Database view:

- Joins have been added as necessary.
- To allow for aggregation at different levels of granularity, some model query subjects have been created. For example, see the relationships between Time and Sales or Sales fact.
- To allow single joins to be made between the lookup tables and each level in a dimension, lookup tables have been copied. For example, see the Products look up tables.

The Business view contains only model query subjects, with no joins. The following changes and additions have been made in the Business view:

- Calculations were added to the model query subjects. For example, the time dimension contains language calculations.
- Where the database has multiple hierarchies, new dimensions have been created to organize each hierarchy. For example, see the employee hierarchies, where employees are organized by manager, organization, region, and position.



The GO Sales Transactional Database

The GO Sales model, great_outdoors_sales.cpf, is based on the GOSALES database, which is structured as a transactional database. It contains principally sales data.

The Database view is very similar to the underlying database structure. The following changes and additions have been made in the Database view:

- To make it possible to join the fact tables to the time dimension, model query subjects and multipart joins have been used.

- Other joins have been added as necessary.

The Business view contains only model query subjects, with no joins. The following changes and additions have been made in the Business view:

- Calculations were added to the model query subjects.
- Model query subjects that were created in the Database view to enable joins on the time dimension have been linked as reference shortcuts.
- Where the database has multiple hierarchies, new dimensions have been created to organize each hierarchy.
- Slowly changing dimensions require calculations to ensure that the correct record for the time period is retrieved. This is done with a calculation such as the one shown below, for the relationship between Sales Staff and Orders.

```
[Business view].[Sales
Staff].[Sales staff code]=[Business view].[Sales].[Sales staff code]
and ([Business view].[Sales].[Day key (order date)] between [Business
view].[Sales Staff].[Day key (record start date)]  and [Business
view].[Sales Staff].[Day key (period record end date)] )
```

Setting Up the Samples

Cognos 8 provides sample databases for SQL Server, Oracle, and DB2 that contain sales and marketing information for a fictional company named the Great Outdoors. You can use Cognos sample packages and reports to help you learn how to use Cognos 8, including Framework Manager and Metric Designer.

Restore Backup Files for the Samples Databases

To use the samples, you must restore backup files for the samples databases. This action re-creates multilingual versions of the Great Outdoors databases.

The following sample databases and associated files are provided with Cognos 8. For SQL Server and Oracle, each database is delivered as a Microsoft SQL Server backup file and an Oracle export file (.dmp). For DB2, the database schemas are delivered in a DB2 move file. The file are compressed, and you must extract them before you can restore the databases or schemas.

Database or schema description	SQL Server	Oracle	DB2
Great Outdoors sales	GOSALES.zip	GOSALES.dmp.gz	GS_DB.tar.gz
Great Outdoors retailers	GOSALES.zip	GOSALESRT Restore Backup Files .dmp.gz	GS_DB.tar.gz

Database or schema description	SQL Server	Oracle	DB2
Great Outdoors sales data warehouse	GOSALESDW.zip	GOSALESDW.dmp.gz	GS_DB.tar.gz
Great Outdoors market research	GOSALES.zip	GOSALESMR.dmp.gz	GO_DB.tar.gz
Great Outdoors human resources	GOSALES.zip	GOSALESHR.dmp.gz	GO_DB.tar.gz

When restoring the samples databases, ensure that you do the following:

- Give the restored databases the same names as the backup or export file names.

  The names are case-sensitive.

- Create a user in your database who has select privileges for all schemas.

  The GO Sales package references tables in all schemas.

- Use the UTF-8 character set.

- Have sufficient disk space available in the target location. Reserve 150MB for the GO Sales data (four schemas) and 200MB for the GO Sales warehouse data (one schema).

Oracle Considerations

To create foreign key constraints in tables that reference different schemas, you must run ora_gosales.sql, found in the same folder as the .dmp files.

SQL Server Considerations

If you restore the SQL Server backup files, you must use Microsoft SQL Server 2000 or Microsoft SQL Server 2005. Ensure that TCP/IP connectivity is used for the SQL server.

DB2 Considerations

Before you restore the Great Outdoors schemas contained in the DB2 move file on UNIX or Windows, extract the DB2 move file. On UNIX, extract the DB2 move file using the *gnutar -xcvf DB2_move_filename* or *tar -xcvf DB2_move_filename* command. If you use WinZip to extract the DB2 move file on Windows, ensure that the TAR file smart CR/LF conversion option is not selected.

After extracting the DB2 move file, restore the schemas to a database named GS_DB. When you create this database in DB2, create a buffer pool with a page size of 16 KB and an associated tablespace.

To restore schemas to the GS_DB database, you must edit the gs_db_modify.sql file and enter a user name and password in the file. You must also run the gs_db_modify.bat file to create additional views and constraints in the GS_DB database.

Steps

1. On the computer where Cognos 8 is installed, go to the sql server, oracle, or db2 directory located in *c8_location* /webcontent/samples/datasources.
2. If required, copy the backup files for the samples databases to your database backup directory.

   To ensure the security and integrity of Cognos 8, copy the files to a directory that is protected from unauthorized or inappropriate access.
3. Restore the samples databases using your database management tool.

   Tip: For SQL backup files, restore the database from a device and ensure that the restore locations are correct for the .ldf and .mdf database files. For more information, see the Microsoft SQL Server documentation or the Cognos Knowledge Base (http://support.cognos.com/kb-app/knowledgebase).
4. For each database, create at least one user who has select permissions for all the tables in the restored databases.

You can now create the data source connections in the portal.

Create Data Source Connections to the Samples Databases

You must create data source connections to the samples databases that you restored. Cognos 8 uses this information to connect to the samples databases and run the sample reports or use the sample package.

The DB2 database name that you type must use uppercase letters. Also, in Framework Manager, the schema names that you type for the DB2 data sources must use uppercase letters.

Before you create the data source connections, you must restore the backup files for the samples databases. Also, ensure that the Cognos 8 service is running.

To create data sources, you must have execute permissions for the Directory secured feature and traverse permissions for the Administration secured function.

Steps

1. Open Cognos Connection.
2. In the upper-right corner, click **Launch**, **Cognos Administration**.
3. On the **Configuration** tab, click **Data Source Connections**.
4. Click the new data source button .
5. In the **Name** box, type **great_outdoors_sales** and then click **Next**.

6. In the connection page, click the type of database that you restored and want to connect to, select an isolation level, and then click **Next**.

   The connection string page for the selected database appears.

   Tip: The user specified in the great_outdoors_sales data source must have select privileges on the tables in each of the GOSALES, GOSALESRT AND GOSALESHR schemas (p. 42).

7. Do one of the following:

   - If you restored the samples databases in SQL Server, in the **Server Name** box, type the name of the server where the restored databases are located. In the **Database name** box, type **GOSALES**.

     Cognos 8 samples require TCP/IP connectivity with SQL Server. Ensure the SQL Server Security is set to SQL Server and Windows, instead of Windows Only. The samples use SQL Server security for authentication.

   - If you restored the samples databases in Oracle, in the **SQL*Net connect string** box, type the Oracle connection string.

   - If you restored the samples database in DB2, in the **DB2 database name** box, type **GO_DB** using uppercase letters. In the **DB2 connect string** box, type the DB2 connection string.

8. Under **Signons**, select the **Password** and **Create a signon that the Everyone group can use** check boxes, type the user ID and password for the user that you created when you restored the databases, and then click **Finish**.

   Tip: To test whether the parameters are correct, click **Test**.

9. Click **Finish**.

10. Repeat steps 4 to 9 for the GOSALESDW samples database.

    For the GOSALESDW database in SQL Server and Oracle, type **great_outdoors_warehouse** for the data source name and **GOSALESDW** for the database name. For DB2, type **great_outdoors_warehouse** for the data source name and **GS_DB** for the database name.

The Great Outdoors data source connections appear as entries in the **Data Sources** tab of the **Directory** tool.

You can now import the samples unless there is a syntax error in the connection string or an incorrect parameter.

Set Up Microsoft Analysis Services Cube Samples

Microsoft Analysis Services (MSAS) cubes are provided which you can use from Cognos Connection or Framework Manager. The cube samples are contained in the GOSALESDW.cab and GOSALESDW.abf archive files in the *c8_location*/webcontent/samples/datasources/cubes/MSAS directory. The archive files must be restored to a Microsoft SQL Server database running Microsoft Analysis Services (p. 42).

The Go Sales Fact cube contains the same monthly sales data as the GOSALESDW database.

The GO Finance Fact cube contains year-to-date and monthly financial data for all accounts so you can create model financial statements in Analysis Studio, Query Studio, and Report Studio. The GO Finance Fact cube contains Actuals in US dollars submissions for 2004, 2005, or 2006.

Note: Both Microsoft XML 6.0 Parser and Microsoft SQL 2005 Analysis Services 9.00 OLEDB Provider must be installed on the local client in order to establish data source connections to MSAS cubes.

Steps

1. On the computer where Cognos 8 is installed, go to the *c8_location*/webcontent/samples/datasources/cubes/MSAS/en directory.
2. Copy the GOSALESDW.cab and GOSALESDW.abf files to a directory that you can access from the Analysis Manager console in the Analysis Servers of Microsoft SQL Server.
3. Use the Analysis Manager to restore the database from the GOSALESDW.cab and GOSALESDW.abf files.

You can now create the data source connections using either the GO Sales Fact or GO Finance Fact cubes (p. 46).

Set Up the DB2 Cube Sample

To set up the DB2 cube sample, you must have Hyperion Essbase installed, and a DB2 OLAP Server with Essbase Integration Services Console.

Steps

1. Using Essbase Integration Services Console, perform an outline member load and a data load.
2. Using the GOSLDW_ML database for the cube, import the GOSLDW_EN_FR_DE_JA_RU_SC.xml model and the GOSLDW_*language*.xml metadata outline for the language that you want to use, where *language* is one of: EN (English), DE (German), FR (French), JA (Japanese), RU (Russian) or SC (Chinese).

   Information about cubes is available in the cube details file for each language: DB2OLAPGOSLDW*language*CubeInfo.xml.
3. Using Hyperion Solutions Essbase Administration- Administration Console, set up the generations for the model and populate the cube.

You can now create a data source connection to the cube (p. 46).

Create Data Source Connections to OLAP Data Sources

Cognos 8 provides the following OLAP samples:

- GO Sales Fact and GO Finance Fact Microsoft Analysis Services cubes
- Great Outdoors Company cube
- Great Outdoors DB2 cube

You must create data source connections to the cubes to use the samples. You must set up the Microsoft Analysis Services cube samples or set up the DB2 cube sample, if you are using them, before creating data source connections.

You can increase the read cache size to improve query performance, although this setting has no effect on the initial time required to open a cube.

To create data sources, you must have execute permissions for the Directory secured feature and traverse permissions for the Administration secured function.

Steps for PowerCubes

1. Open Cognos Connection.
2. In the upper-right corner, click **Launch**, **Cognos Administration**.
3. On the **Configuration** tab, click **Data Source Connections**.
4. Click the new data source button.

   Note: You must add a data source connection for each cube.
5. To create a data source connection for the Sales and Marketing cube, type **sales_and_marketing** in the **Name** box, and then click **Next**.

   You can define a Windows path or a UNIX path.

   If you define a UNIX path and you plan to use Framework Manager, you must also define the Windows path and ensure that the cube is also available in the Windows location. Framework Manager can access cubes only from Windows locations.
6. In the connection page, under **Type** click **Cognos PowerCube**, select an isolation level, and then click **Next**.

   The connection string page for the selected database appears.
7. In the **Read cache size** (**MB**) box, type the cache size of the cube in megabytes.

   If you leave this field blank or type 0, Cognos Connection uses the default value in the ppds_cfg.xml file in the configuration folder.
8. In the **Windows location** box, type the location and name of the SalesandMarketing.mdc file for the data source connection. For example, type

   ***c8_location*/webcontent/samples/datasources/cubes/PowerCubes/En/SalesandMarketing.mdc**
9. To test whether the parameters are correct, click **Test**.
10. Click **Finish**.

You can now import the sample package for the PowerCube to use this data source.

Steps for DB2 Cubes

1. Open Framework Manager.
2. Click **Create a new project**.

3. In the **New Project** page, specify a name and location for the project.
4. In the **Select Language** page, click the design language for the project.
5. Click **OK**.

   The Import wizard appears.
6. In the connection page, under **type** click **IBM DB2 OLAP Server**, select an isolation level, and then click **Next**.

   The connection string page for the selected database appears.
7. In the **Server name** box, type the name of the server.
8. To test whether the parameters are correct, click **Test**.
9. Click **Finish**.

To use this data source, you must create a package using this data source in Framework Manager, and then publish the package.

Steps for Microsoft Analysis Service Cubes

1. Open Cognos Connection.
2. In the upper-right corner, click **Launch**, **Cognos Administration**.
3. On the **Configuration** tab, click **Data Source Connections**.
4. Click the new data source button.
5. In the **Name** box, type **go_sales_fact** or **go_finance_fact** and then click **Next**.
6. In the connection page, click the type of Microsoft SQL Server database that you restored and want to connect to, select an isolation level, and then click **Next**.

   The connection string page for the selected database appears.
7. In the **Server Name** box, type the name of the server where the restored databases are located. If needed, in the **Database name** box, type the name of the database you restored.
8. Under **Signons**, select the **Password** and **Create a signon that the Everyone group can use** check boxes, type the user ID and password for the user that you created when you restored the databases, and then click **Finish**.

   Tip: To test whether the parameters are correct, click **Test**.
9. Click **Finish**.
10. You now have the option to create a package using your new data source. Click **Create a Package** and **OK**, and follow the instructions in the new package wizard.

    Note: You must create a package with this data source in order to use this data source, and you must create a connection between the GOSALESDW_MSAS2005.zip deployment and the MSAS service before you can use the samples.

11. Click **New Connection** and follow the steps in the new connection wizard, naming the connection GOSALESDW_MSAS2005, and selecting the database based on the language you are using. For example, GOSALESDW for English, or GOSALESDW_DE for German.

    When the new connection is created, it appears in the data source connection list.

Import the Samples

To use the sample package and other content, you must import them from the sample deployment archive.

Before you import the Cognos_Samples.zip and GO_Metrics.zip deployment archives, you must restore the databases (p. 42). For each database, you must create one or more named users with select permissions for the database tables. You must also create data source connections to the samples databases (p. 44).

Before you import the Cognos_PowerCube.zip or Cognos_PowerCube_Financial.zip deployment archive, you must create a database connection to the appropriate PowerCube (p. 46) and select the language that you want to use. The language that you select must be supported by your locale.

Steps

1. Copy the zip file from the *c8_location*/webcontent/samples/content directory to the directory where your deployment archives are saved.

   The default location is *c8_location*/deployment. The location is set in the configuration tool. For information about changing the location, see the configuration tool online help.

2. Open Cognos Connection.

3. In the upper-right corner, click **Launch**, **Cognos Administration**.

4. On the **Configuration** tab, click **Content Administration**.

   Note: To access this area in Cognos Administration, you must have the required permissions for the **Administration tasks** secured feature.

5. On the toolbar, click the new import button.

   The **New Import** wizard appears.

6. In the **Deployment Archive** box, select **Cognos_Samples**, **Cognos_Powercubes**, **GO_Metrics**, or **GO_Audit**.

7. Click **Next**.

8. Type a unique name and an optional description and screen tip for the deployment archive, select the folder where you want to save it, and then click **Next**.

9. In the **Public Folders Content** box, select the packages and folders that you want to import.

   The Cognos_Samples deployment archive has the following packages or folders:

   - **GO Data Warehouse (analysis)**, **GO Data Warehouse (query)**, **GO Sales (analysis)**, **GO Sales (query)**, **Sample Template** and **Practical Examples**.

The Cognos_PowerCube deployment archive for the **Great Outdoors Company** has packages or folders for the following languages:

- English
- French
- German
- Japanese
- Russian
- Simplified Chinese

10. Select the options you want, along with your conflict resolution choice for options that you select, and then click **Next**.
11. In the **Specify the general options** page, select whether to include access permissions and references to external namespaces, and who should own the entries after they are imported.
12. Click **Next**.

    The summary information appears.
13. Review the summary information and click **Next**.
14. Select the action that you want:
    - To run once now or later, click **Save and run once**. Click **Finish**, specify the time and date for the run, then click **Run**. Review the run time and click **OK**.
    - To schedule at a recurring time, click **Save and schedule**. Click **Finish**, and then select frequency and start and end dates. Click **OK**.

      Tip: To temporarily disable the schedule, select the **Disable the schedule** check box.
    - To save without scheduling or running, click **Save only** and click **Finish**.
15. When the import is submitted, click **Finish**.

You can now use the sample packages to create reports and analyses in Report Studio, Query Studio, and Analysis Studio, view extracts in Metric Designer, or create agents in Event Studio. You can also run the sample reports that are available on the Public Folders tab in the portal.

Sample Database Models

The following sample models provide information for the fictional company, the Great Outdoors and are provided with Cognos 8:

- go_sales, which refers to the samples database GOSALES
- go_data_warehouse, which refers to the database GOSALESDW
- gosales_scriptplayer, which refers to the samples databases GOSALES

You can use sample database models on different platforms. For information about moving models from one platform to another, see the Framework Manager *User Guide*.

Note: Transformer 8 uses some of the reports in the GO Data warehouse (query) package and GO Sales (query) package as source data for various cubes. These reports are meant to be simple list reports with no formatting. The description information for the reports indicates if the report was developed to be source data for Transformer 8.

GO Sales Model

This model contains sales analysis information for the fictional company, The Great Outdoors. It also has the query items required by the Event Studio samples. The model accesses three schemas and has two packages. One package is based on the dimensional view and the other is baed on the query (relational) view.

GO Data Warehouse Model

This model contains financial, human resources, and sales and marketing information for the fictional company, The Great Outdoors. The model accesses a dimensional relational data source. The model has two packages. One package is based on the dimensional view, the other is based on the query (relational) view.

GO Sales Scriptplayer

These files can be used to run the action logs in sequence. This action generates a model named gosales_scriptplayer, and publishes a package to the content store.

Remove the Samples Databases from Cognos 8

You can delete the packages on which the samples are based after you finish using the sample reports to learn about Cognos 8, including Framework Manager. This action permanently removes the samples from the content store.

Steps

1. Open Cognos Connection.
2. Click the **Public Folders** tab.
3. Select the check box for the sample package you want to delete.
4. Click the delete button on the toolbar, and click **OK**.

   To use the samples again, you must set up the samples.

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